

# **Request for Information**

***Regarding an Online Application***



**Montana Department of Public Health and Human Services**

**Technology Services Division**

**March 12, 2009**



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## **1 Project Overview**

The State of Montana Department of Public Health and Human Services (DPHHS or Department) plans to implement an online application for its health and human services programs. The Department is seeking information regarding online application options from vendors. Vendor responses will help the Department to determine which solution may best fit their needs. The Governor's Budget Office requires that any major IT investment be based on the results of a Request for Information (RFI). The Department anticipates that this RFI will generate creative responses, which will focus the Department's technical approach to designing and implementing an online application.

Montana is excited to be in the middle of the online application pack. Montana hopes to gain from the plethora of experience vendors and states have gained regarding online applications over the past few years. The Department wishes to hear from vendors that modify open source code, vendors that offer custom design solutions, and those that customize commercial off-the-shelf products.

The Department is interested in implementing a wide range of functionality over a large number of social and health services programs. DPHHS anticipates that vendors will guide the State in selecting the right programs and functionality to implement – whether it be all at once or in phases.

### **1.0 Purpose and Objectives**

The Department wants to implement an online application to allow its residents to easily screen for potential program eligibility, apply for services, inquire about benefits, and report changes over the Internet. An online application will support applicants and recipients in efficiently communicating and exchanging information with the State's social service and health programs. Online applications should increase Montanans' access to services, improve communication with eligibility offices, and create efficiency gains for the State.

DPHHS is in the midst of procuring, designing, developing, and implementing new, web-based eligibility systems for Medicaid, Temporary Assistance for Needy Families (TANF), and Supplemental Nutrition Assistance Program (SNAP, known as food stamps until October 2008). The State's children's healthcare program, Healthy Montana Kids, is also web-based. The Department wants to allow Montanans to apply for these, and eventually other, programs, over the web.



Responses will be subject to State government and public disclosure. All information submitted including addresses, phone numbers, email addresses, and personally identifiable information contained within responses to this RFI will be public. Do not send proprietary, commercial, financial, business confidential, trade secret or personal information that should not be made public.

## **2 Enterprise Architecture**

The Department is implementing an enterprise architecture, beginning with the Medicaid, TANF, SNAP, and Healthy Montana Kids eligibility systems. The enterprise architecture will consist of service-oriented architecture, an enterprise service bus, a web portal, single sign on, and shared information and web services. The enterprise architecture and its component parts are included in the TANF and SNAP procurement, and should be in place by the first quarter of 2011. The Department expects that the online application will use the enterprise architecture to exchange information with the eligibility and benefits systems. The Department will need an interim approach to exchanging information between the online application and the eligibility systems until the enterprise architecture is implemented.

## **3 Functional System Requirements**

The State is interested in implementing an array of online application system functionality. The entire list of desired functionality is included in this section. The Department wants vendors to provide guidance in how to best design and build Montana's application. The Department hopes that vendors will suggest whether it is preferable to implement a large array of functionality at once or incrementally. The Department is also looking for guidance on whether they should include one program, a few programs, or all of its component programs in its application.

The Department wants vendors to discuss the following system functionality in their responses. Vendors should feel free to discuss additional functionality, if appropriate.

- A. How the application would use web-based functionality.
- B. How applicants create or receive unique user usernames and PINs/passwords.
- C. How a screening tool would function.
- D. How applicants would scan and attach documents to their online applications.
- E. How the online application would support electronic signatures.
- F. How the online application would store and purge incomplete applications.
- G. How the online application would route information to appropriate offices both with and without an enterprise architecture.



- H. How the online application would coordinate with programs' case management tools.
- I. How applicants would track application, eligibility, benefit, and enrollment status information.
- J. How recipients would report changes.
- K. How recipients would complete redetermination/recertification processes.
- L. How online help would function.
- M. How online education would function.
- N. How individuals would use the online application to communicate with program offices.
- O. How the State could modify text and formatting in the online application.
- P. How calendaring would function.
- Q. How security would function.
- R. How the application would be HIPAA compliant.

#### **4 RFI Response Instructions**

The State is asking all interested parties to submit a response containing the following information. Vendors should refer to the numbers below in their responses, to enable efficient Department review.

1. Company information, including name, mailing address, telephone number, and name of a contact person from the firm.
2. Your interest in providing the services/supplies.
3. A brief description of your past experience with providing similar services/supplies.
4. A detailed description of the online application functionality, referring to the lettered functional system requirements in Section 3. Additional functionality options should be included as well.
5. If the State has not identified all major components necessary for the project, please provide information on what other components are necessary.
6. A list of potential problems/risks that the State may encounter during this project. Please provide any ideas or suggestions about how such problems/risks should be addressed.
7. Your best estimate of the cost to complete the project. The State would like to see cost broken out by program and system functionality. An example cost estimate worksheet is included in Section 8.
8. A discussion of whether software maintenance is optional or required.
9. A discussion of technical support provided by your company.
10. Your best estimate of the timeframe needed to complete the project.
11. Any additional descriptive information about your online application solution, including brochures or websites.



Although we can provide no reimbursement for your efforts in response to this RFI and any response is voluntary, any information and assistance you can give us by responding to this request would be greatly appreciated. If you choose not to respond, it will have no impact on the Department's future contract considerations with your firm. If you do choose to respond, please comply with all aspects of the RFI as thoroughly as possible.

Electronic responses in Microsoft Word in CD format are preferred. If that is not possible, emailed responses will be accepted. Please send responses to:

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Helena, MT 59604  
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If you have any questions regarding this RFI or our planning process, please contact the above person either by written letter, telephone, or email.

Please provide your response by 5:00 p.m. (MST), April 24, 2009.

## **5 Oral Presentations & Product Demonstrations**

The Department may request that vendors make an oral presentation and/or product demonstration to clarify their RFI response or to further define their suggested approach. In either case, vendors wanting to participate should be prepared to send qualified personnel to Helena, Montana, to discuss technical aspects of the RFI response. Oral presentations and product demonstrations shall be at the vendor's expense.

## **6 State IT Standards and Requirements**

The State's information technology environment is managed and operated from an enterprise perspective. The governance structure involves several organizations, the Information Technology Services Division (ITSD) of the Department of Administration, and agency information technology organizations.



A description of the computing and telecommunications environment and standards that have been established for the State is available from the following site: <http://itsd.mt.gov/techmt/compenviron.asp>. Hardware and software that fall under these standards represent a large majority of the installed base. For a complete list of the Montana Software Standards, please visit the following site: <http://itsd.mt.gov/policy/software.asp>.

Information regarding connectivity and/or how users access the system can be found at: <http://itsd.mt.gov/techmt/summitnet.asp>.

It is expected that any solution, COTS or a hosted application, must be compliant with the State's IT standards and requirements. The State expects the online application provided to operate in an environment that complies with the State and federal standards pertaining to performance, security, and accessibility. The system should also have adequate audit and security controls, meet the State's networking and bandwidth requirements, and meet the standards of existing State systems.

## **7 Resources**

Code of Federal Regulations: 42 CFR et seq. Sections of the Code of Federal Regulations may be accessed from the following web site: <http://www.access.gpo.gov/nara/cfr/cfr-table-search.html>

Montana Code Annotated – Title 50, 52, and 53:  
[http://data.opi.State.mt.us/bills/mca\\_toc/index.htm](http://data.opi.State.mt.us/bills/mca_toc/index.htm).

Administrative Rules of Montana – Chapter 37: <http://www.mtrules.org>.



## 8 Cost Estimate Worksheet Example

The worksheet below is an example to help vendors organize cost estimates by program and by system functionality. Some system functionality may not make sense to break down by program. In those cases, vendors should note that and only include a total estimated cost. Vendors are welcome to present cost information in any format they prefer; the following is only one possible template.

Functionality	SNAP	TANF	Medicaid	Healthy MT Kids	Other (LIEAP, CAPS, etc.)	TOTAL
Web-based Online Application						
Screening Tool						
Attaching Scanned Documentation						
Electronic Signature						
Online Status Tracking						
Change Reporting						
Recertification/Redetermination						
Online Help						
Online Education						
Communication Tool						
Calendaring						
Additional Proposed Functionality						
TOTAL						